ASCENDER
ELEVATING TECHNOLOGY SOLUTIONS
ASCENDER GUIDES
ASCENDER
ELEVATING TECHNOLOGY SOLUTIONS

Admin Guide: ASCENDER EmployeePortal Leave Requests Setup

Table of Contents

Admin Guide: Leave Requests Setup 1

Admin Guide: Leave Requests Setup

This guide provides the necessary steps to set up Security Administration and Payroll in order to take complete advantage of the benefits associated with using the leave request feature in EmployeePortal.

This guide assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the ASCENDER Business Overview guide.

Prerequisites

Set up Supervisor and Temporary Approver Profiles

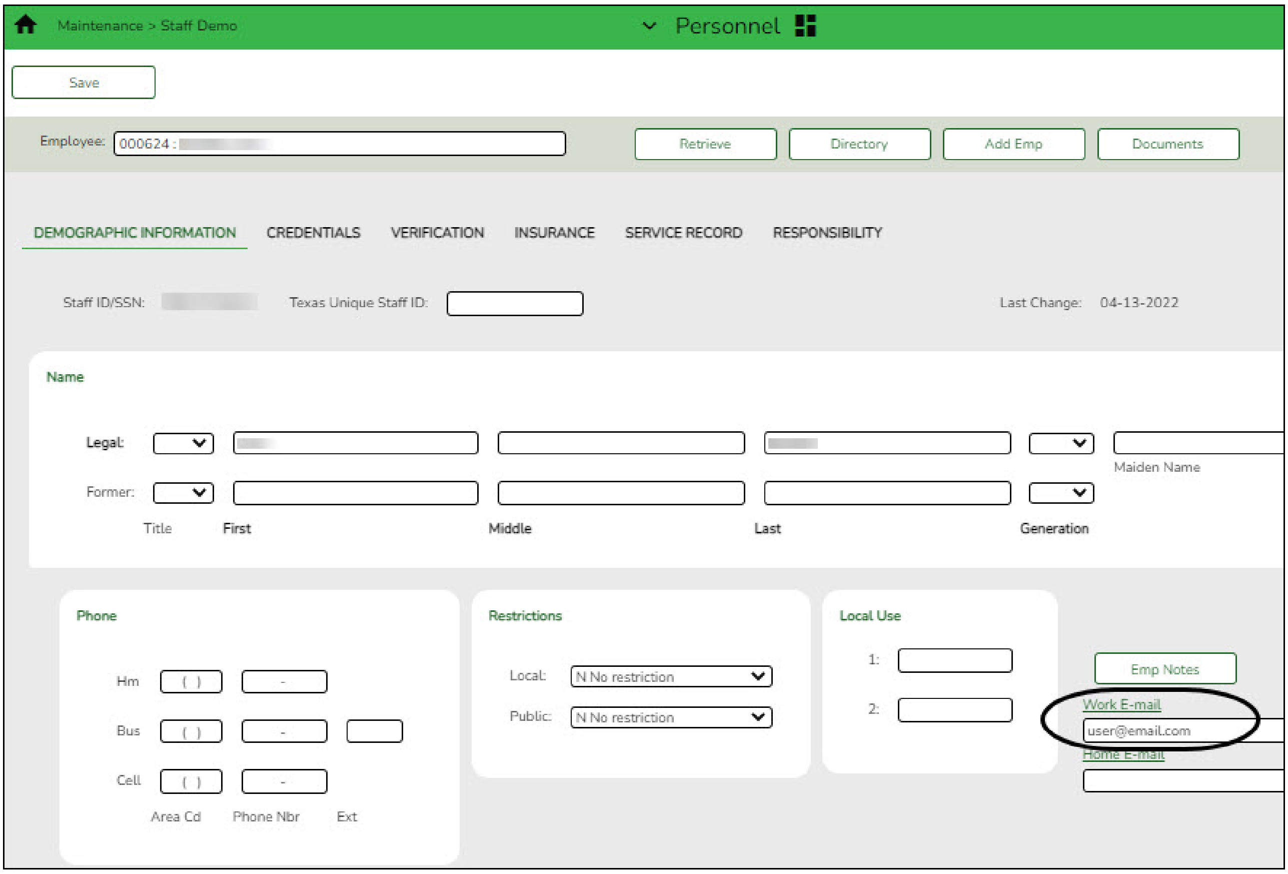
Before an employee can be set up as a supervisor, approver, or temporary approver, the employee must have a security user profile.

1. Create a demographic record.

   Personnel > Maintenance > Staff Demo > Demographic Information

   ❑ Create an employee record. The record cannot be a non-employee record created in District Administration.

   ❑ Add an email address to the employee record to allow the supervisor or temporary approver to receive automatic reply and workflow emails.


Maintenance > Staff Demo
Personnel
Save
Retrieve
Directory
Add Emp
Documents
DEMOGRAPHIC INFORMATION
CREDENTIALS
VERIFICATION
INSURANCE
SERVICE RECORD
RESPONSIBILITY
Name
Title
First
Middle
Last
Generation
Maiden Name
Phone
Hm
Bus
Cell
Area Cd
Phone Nbr
Ext
Restrictions
Local Use
1:
2:
Emp Notes
Home E-mail

Employee: 000624 : [redacted]

Staff ID/SSN: [redacted]

Texas Unique Staff ID:

Last Change: 04-13-2022

Legal: [redacted] [redacted]

Former:

Local: N No restriction

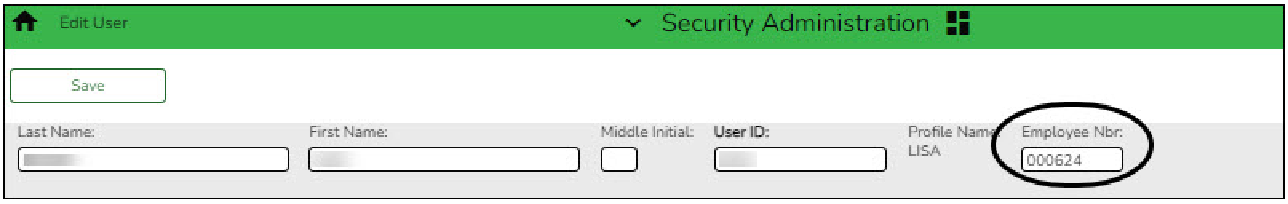
Public: N No restriction

Work E-mail: user@email.com

2. Create a security profile.

Security Administration > Manage Users

☐ Update the user's profile with the employee number that was generated on the employee's Personnel demographic record.


Edit User
Security Administration
Save

Last Name: [redacted]

First Name: [redacted]

Middle Initial:

User ID: [redacted]

Profile Name: LISA

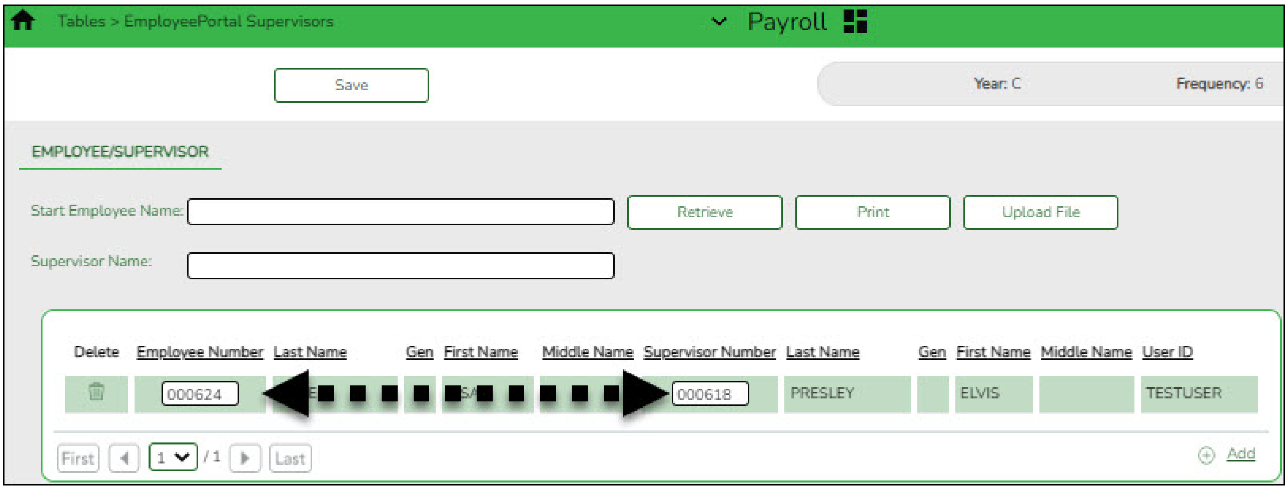
Employee Nbr: 000624

☐ If the employee has an existing user profile, ensure that the profile is active (i.e., not marked as deleted in Security Administration).

3. Designate the employee/direct supervisor relationship.

This setting serves two purposes, it determines the leave request approval path for the employee and allows the supervisor to access the Supervisor menu in EmployeePortal.

Payroll > Tables > EmployeePortal Supervisors > Employee/Supervisor


Tables > EmployeePortal Supervisors
Payroll
Save
Year: C
Frequency: 6
EMPLOYEE/SUPERVISOR
Retrieve
Print
Upload File
First
1
/ 1
Last
Add

Start Employee Name:

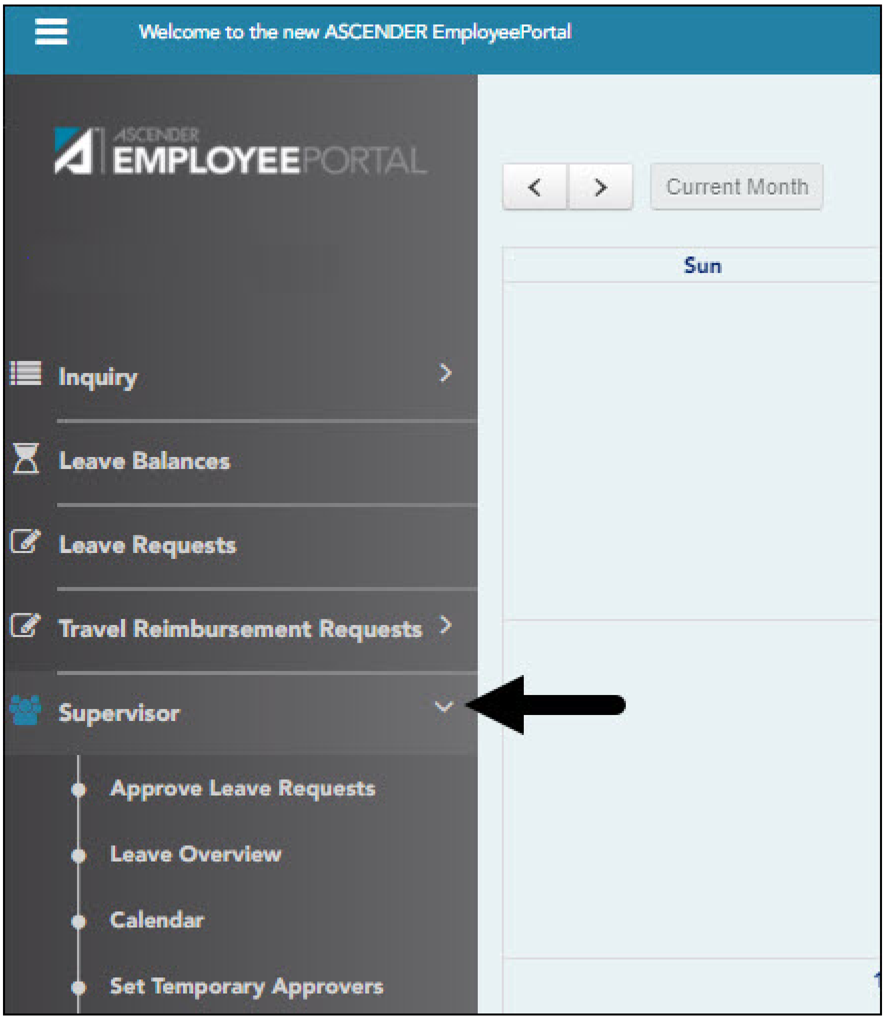
Supervisor Name:

Delete	Employee Number	Last Name	Gen	First Name	Middle Name	Supervisor Number	Last Name	Gen	First Name	Middle Name	User ID
	000624	[illegible]		[illegible]		000618	PRESLEY		ELVIS		TESTUSER

Notes:

- This page does not need to be populated if **Use PMIS for Supervisor Levels** is selected on the Payroll > Tables > District EP Options > EmployeePortal Options tab.
- An employee must have a designated supervisor prior to submitting leave requests in EmployeePortal.

A supervisor must have at least one assigned employee on the Payroll > Tables > EmployeePortal Supervisors > Employee/Supervisor tab in order to access the Supervisor menu in EmployeePortal.


Welcome to the new ASCENDER EmployeePortal
ASCENDER EMPLOYEEPORTAL
Current Month
Sun
Inquiry
Leave Balances
Leave Requests
Travel Reimbursement Requests
Supervisor
Approve Leave Requests
Leave Overview
Calendar
Set Temporary Approvers

Refer to the Supervisor Guide: Manage Leave Data and Requests & Set Temporary Approvers for more information about setting up temporary approvers and performing supervisor-level tasks.

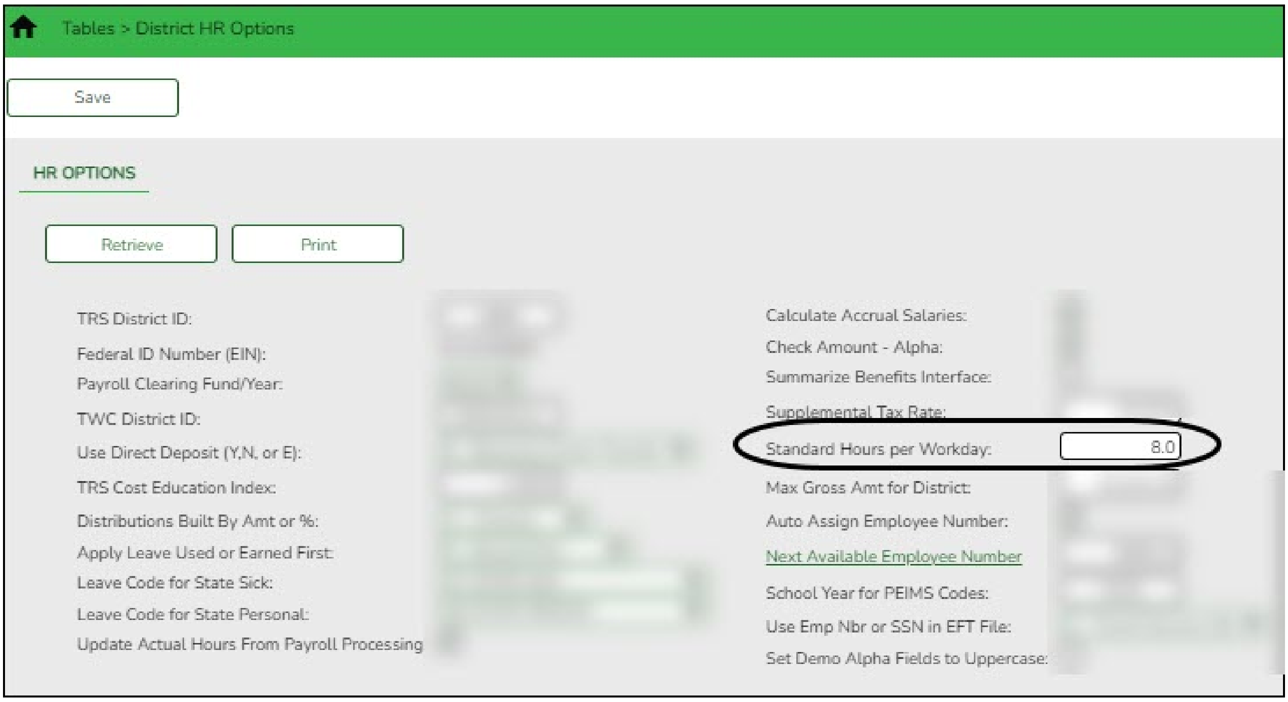
Set up Payroll Options

If you have not already, perform the following tasks to ensure that the leave request feature in EmployeePortal is properly set up and functions as intended for employee and supervisor users.

1. Set the standard work day.

   Payroll > Tables > District HR Options

   In the **Standard Hours per Workday** field, type the standard number of hours that the LEA requires hourly employees to work.

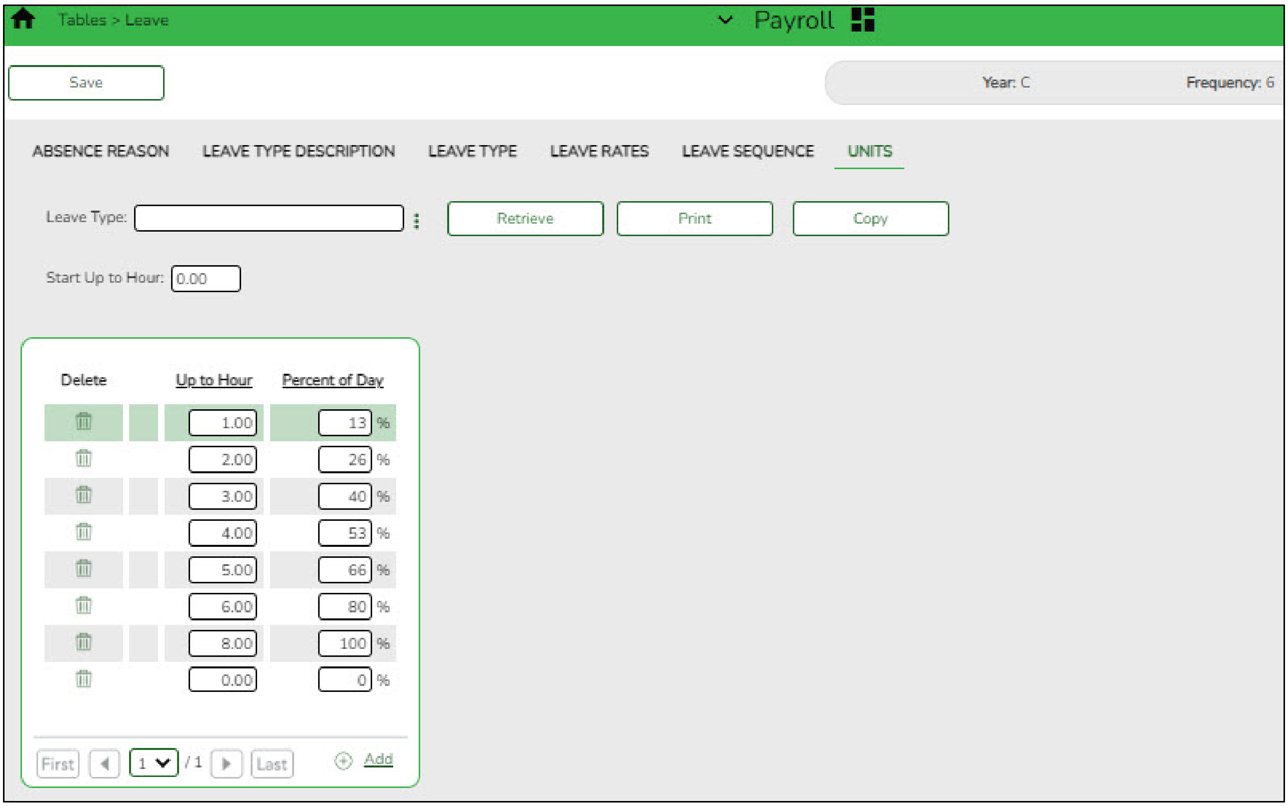

Tables > District HR Options
Save
HR OPTIONS
Retrieve
Print

TRS District ID:
Federal ID Number (EIN):
Payroll Clearing Fund/Year:
TWC District ID:
Use Direct Deposit (Y,N, or E):
TRS Cost Education Index:
Distributions Built By Amt or %:
Apply Leave Used or Earned First:
Leave Code for State Sick:
Leave Code for State Personal:
Update Actual Hours From Payroll Processing
Calculate Accrual Salaries:
Check Amount - Alpha:
Summarize Benefits Interface:
Supplemental Tax Rate:
Standard Hours per Workday: 8.0
Max Gross Amt for District:
Auto Assign Employee Number:
Next Available Employee Number
School Year for PEIMS Codes:
Use Emp Nbr or SSN in EFT File:
Set Demo Alpha Fields to Uppercase:

2. Define the units of hours or days to be used when calculating leave requests.

   Payroll > Tables > Leave > Units

   ☐ If the **Days/Hrs** field is set to *Days* on the Tables > Leave > Leave Type tab for the selected leave type, add units for hours.


Tables > Leave
Payroll
Save
ABSENCE REASON
LEAVE TYPE DESCRIPTION
LEAVE TYPE
LEAVE RATES
LEAVE SEQUENCE
UNITS
Retrieve
Print
Copy
First
Last
Add

Year: C
Frequency: 6

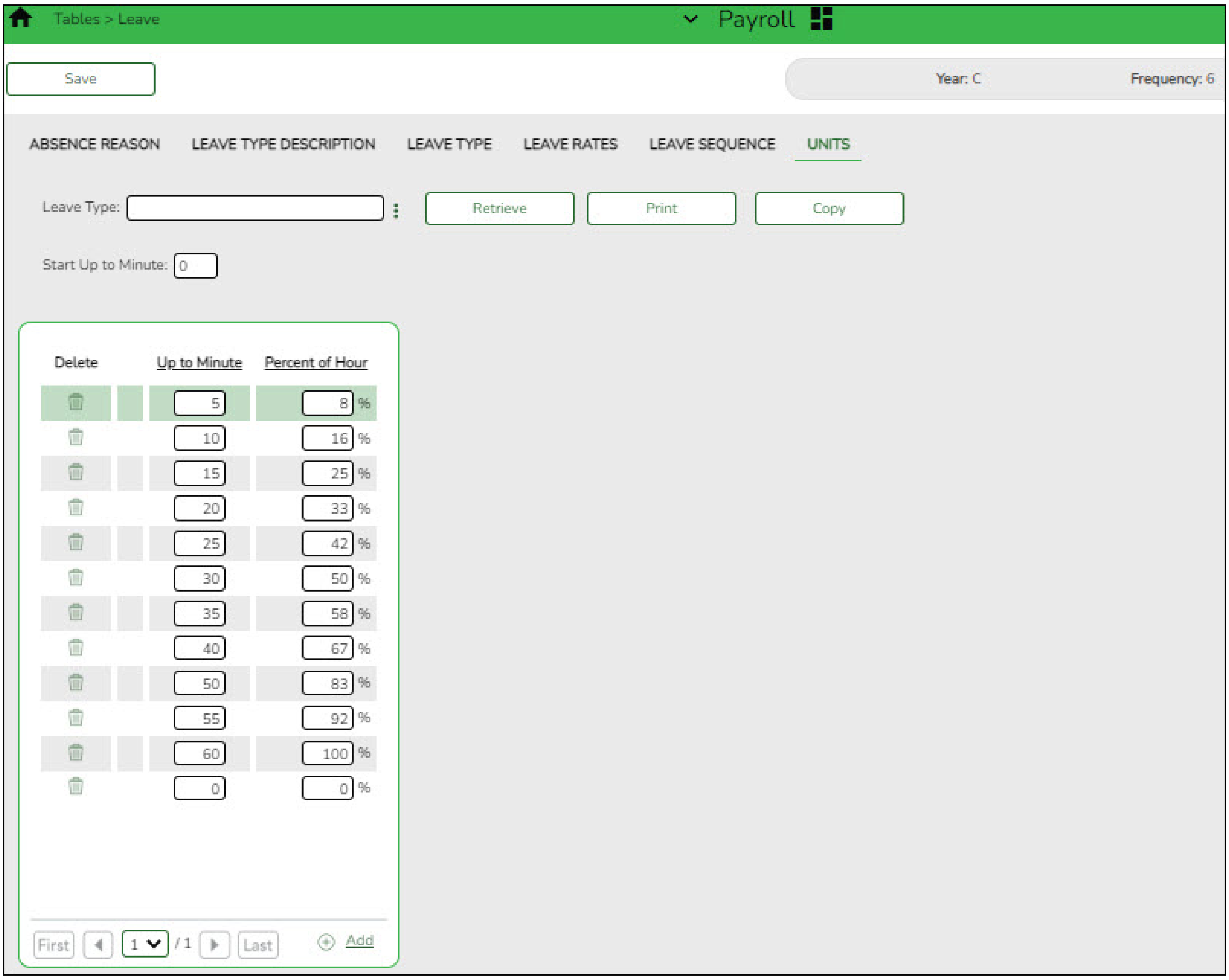
Leave Type:

Start Up to Hour: 0.00

Delete	Up to Hour	Percent of Day
🗑	1.00	13 %
🗑	2.00	26 %
🗑	3.00	40 %
🗑	4.00	53 %
🗑	5.00	66 %
🗑	6.00	80 %
🗑	8.00	100 %
🗑	0.00	0 %

1 / 1

   ☐ If the **Days/Hrs** field is set to *Hours* for the selected leave type, add units for minutes.


Tables > Leave
Payroll
Save
ABSENCE REASON
LEAVE TYPE DESCRIPTION
LEAVE TYPE
LEAVE RATES
LEAVE SEQUENCE
UNITS
Retrieve
Print
Copy
First
Last
Add

Year: C

Frequency: 6

Leave Type:

Start Up to Minute: 0

Delete	Up to Minute	Percent of Hour
🗑	5	8 %
🗑	10	16 %
🗑	15	25 %
🗑	20	33 %
🗑	25	42 %
🗑	30	50 %
🗑	35	58 %
🗑	40	67 %
🗑	50	83 %
🗑	55	92 %
🗑	60	100 %
🗑	0	0 %

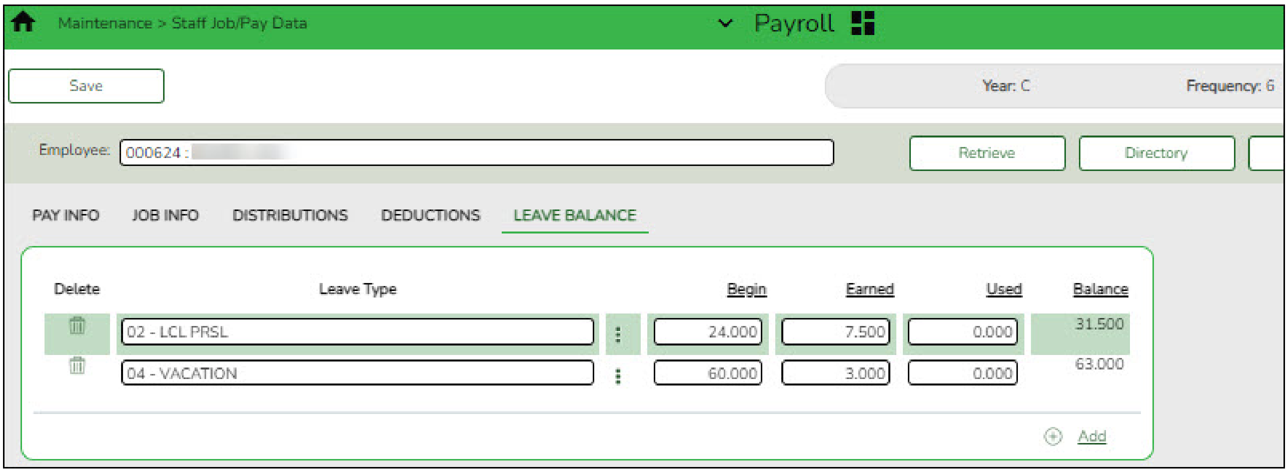
1 / 1

3. Assign leave types and balances for each applicable pay frequency.

   Payroll > Maintenance > Staff Job/Pay Data > Leave Balance

   You can assign multiple leave types to employees in the pay frequency to which you are logged on.

   > **Note**: If the employee has leave balance data in multiple frequencies, the employee can select the pay frequency from the **Pay Frequency** drop down on the Leave Requests page in EmployeePortal.


Maintenance > Staff Job/Pay Data
Payroll
Save
Retrieve
Directory
PAY INFO
JOB INFO
DISTRIBUTIONS
DEDUCTIONS
LEAVE BALANCE
Add

Year: C

Frequency: 6

Employee: 000624 : [redacted]

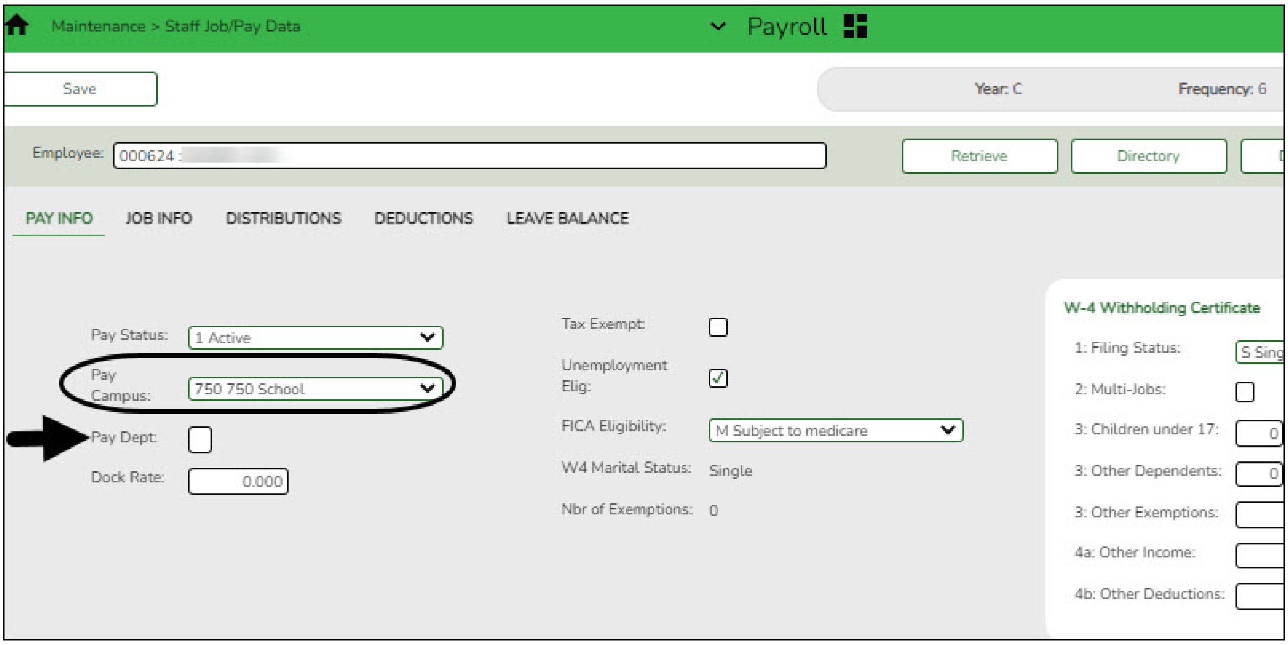
Delete	Leave Type	Begin	Earned	Used	Balance
	02 - LCL PRSL	24.000	7.500	0.000	31.500
	04 - VACATION	60.000	3.000	0.000	63.000

4. Manage leave pay campuses.

The employee's pay campus must exist on the Payroll > Tables > District EP Options > Leave Campuses tab to allow the employee to access the Leave Requests page in EmployeePortal.

❏ Payroll > Maintenance > Staff Job/Pay Data > Pay Info

- Obtain the employee pay campus data.
- *Optional*: Obtain the **Pay Dept** if applicable.


Maintenance > Staff Job/Pay Data
Payroll
Save
Retrieve
Directory
PAY INFO
JOB INFO
DISTRIBUTIONS
DEDUCTIONS
LEAVE BALANCE
W-4 Withholding Certificate

Year: C

Frequency: 6

Employee: 000624 : [redacted]

Pay Status: 1 Active

Pay Campus: 750 750 School

Pay Dept: ☐

Dock Rate: 0.000

Tax Exempt: ☐

Unemployment Elig: ☑

FICA Eligibility: M Subject to medicare

W4 Marital Status: Single

Nbr of Exemptions: 0

1: Filing Status: S Sing

2: Multi-Jobs: ☐

3: Children under 17: 0

3: Other Dependents: 0

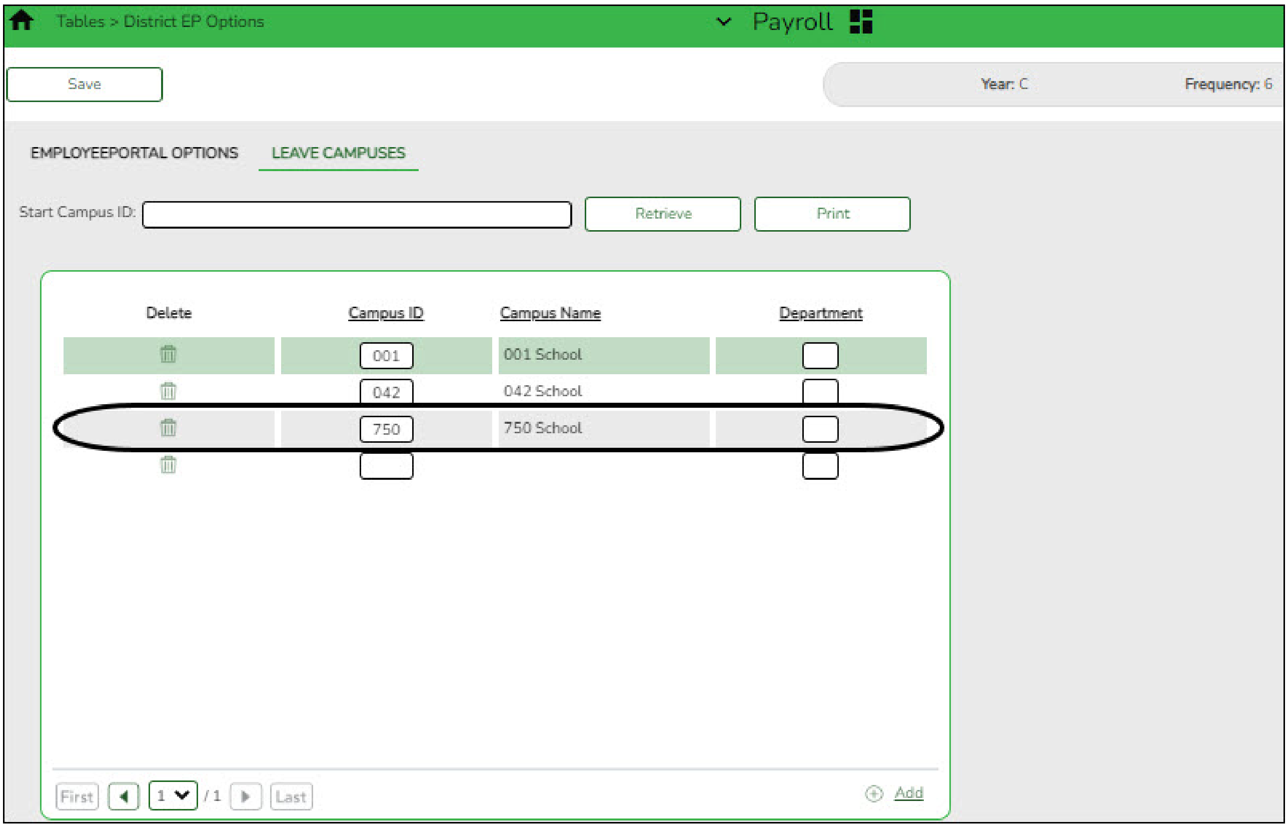
3: Other Exemptions:

4a: Other Income:

4b: Other Deductions:

❏ Payroll > Tables > District EP Options > Leave Campuses

- Each pay campus and department with assigned employees must be added to this tab in order to use the EmployeePortal leave request feature.
- *Optional*: If a **Pay Dept** is assigned to the employee on the Payroll > Maintenance > Staff Job/Pay Data > Pay Info tab, then it must be assigned on the Leave Campuses tab.

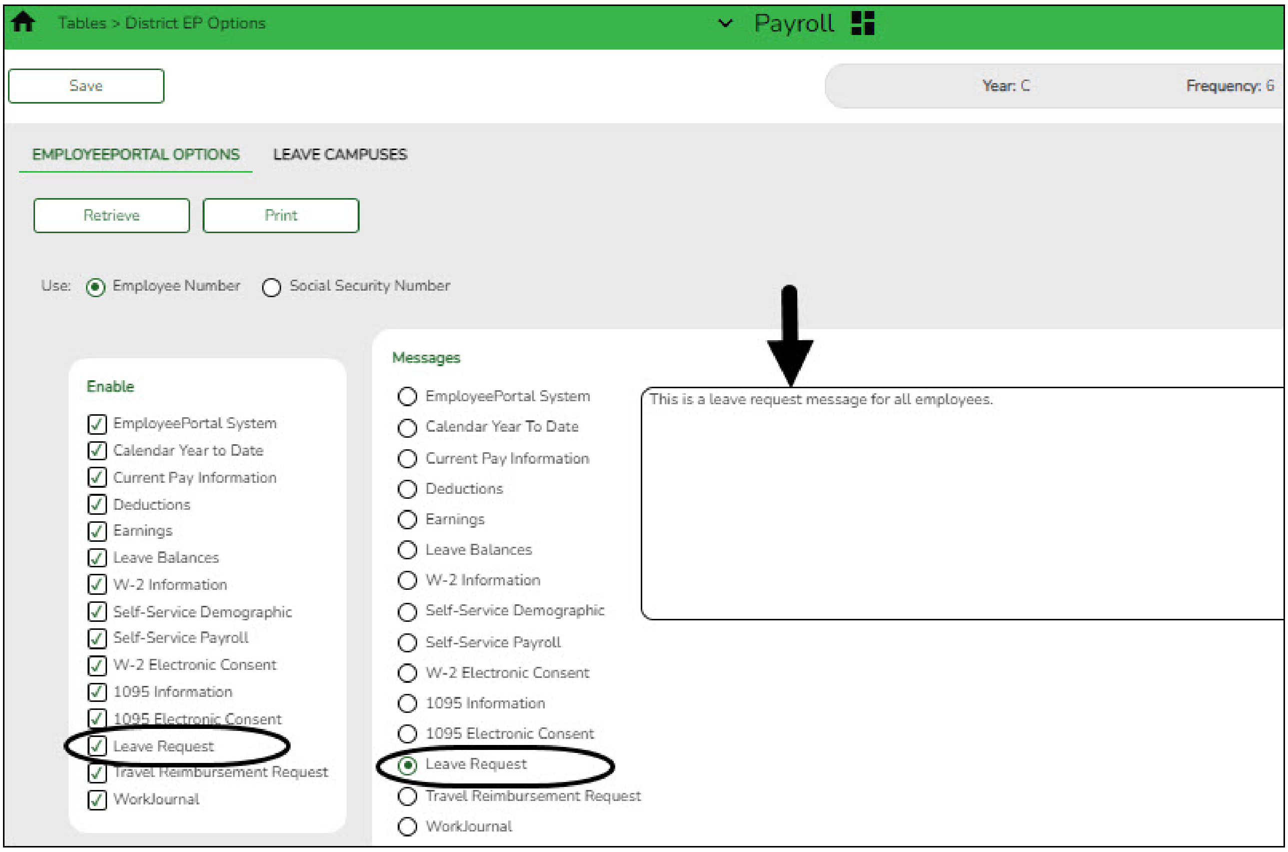

Tables > District EP Options
Payroll
Save
Year: C
Frequency: 6
EMPLOYEEPORTAL OPTIONS
LEAVE CAMPUSES
Start Campus ID:
Retrieve
Print
First
1
/ 1
Last
Add

Delete	Campus ID	Campus Name	Department
🗑	001	001 School	☐
🗑	042	042 School	☐
🗑	750	750 School	☐
🗑			☐

Enable the Leave Request Feature

1. Set up district EP options.

   Payroll > Tables > District EP Options > EmployeePortal Options



Use: ● Employee Number ○ Social Security Number

Enable
☑ EmployeePortal System
☑ Calendar Year to Date
☑ Current Pay Information
☑ Deductions
☑ Earnings
☑ Leave Balances
☑ W-2 Information
☑ Self-Service Demographic
☑ Self-Service Payroll
☑ W-2 Electronic Consent
☑ 1095 Information
☑ 1095 Electronic Consent
☑ Leave Request
☑ Travel Reimbursement Request
☑ WorkJournal

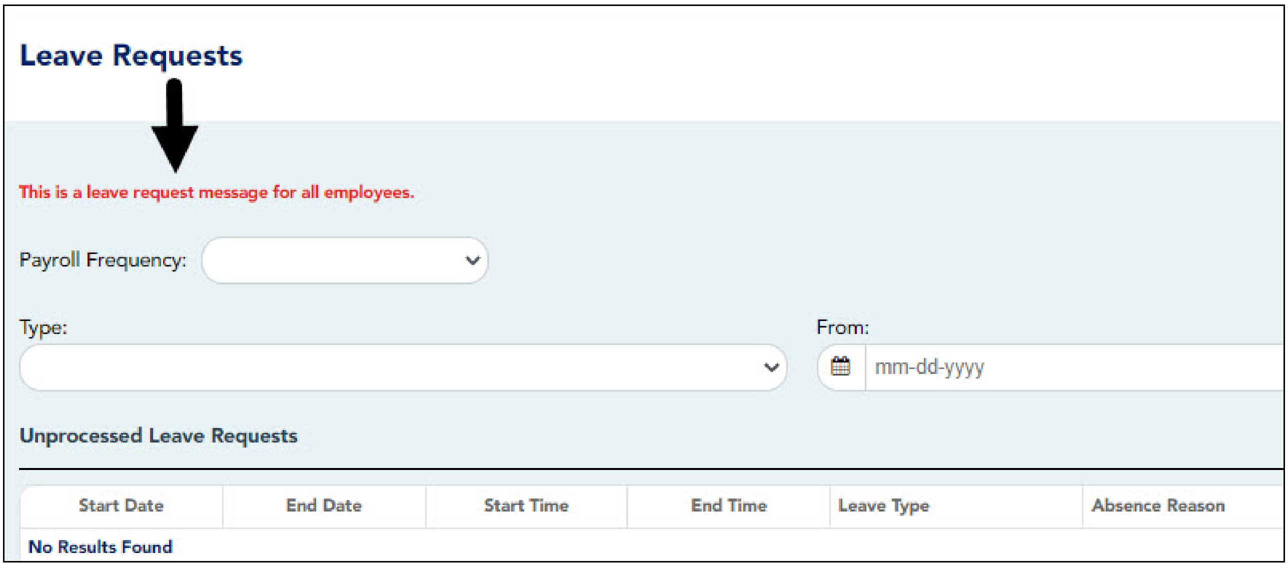
Messages
○ EmployeePortal System
○ Calendar Year To Date
○ Current Pay Information
○ Deductions
○ Earnings
○ Leave Balances
○ W-2 Information
○ Self-Service Demographic
○ Self-Service Payroll
○ W-2 Electronic Consent
○ 1095 Information
○ 1095 Electronic Consent
● Leave Request
○ Travel Reimbursement Request
○ WorkJournal

This is a leave request message for all employees.

☐ Under **Enable**, select **Leave Request** to enable the leave request feature in EmployeePortal.

☐ Under **Messages**, select **Leave Request** to enable employees to view a preset message on the Leave Requests page in EmployeePortal.

- Type the applicable message in the text box.
- The message is displayed in red at the top of the Leave Requests page in EmployeePortal.



Leave Requests

This is a leave request message for all employees.

Payroll Frequency:

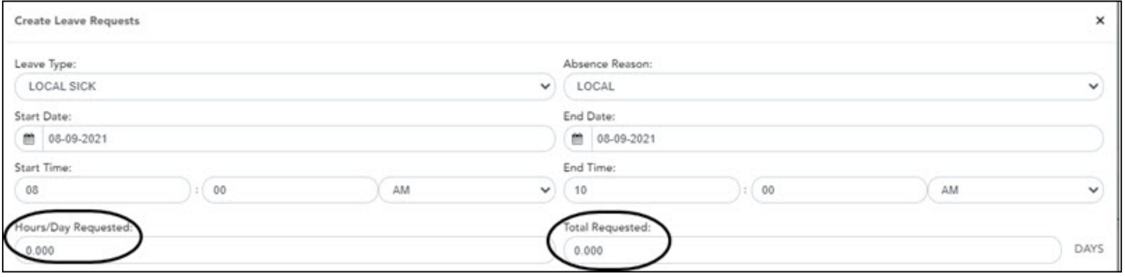
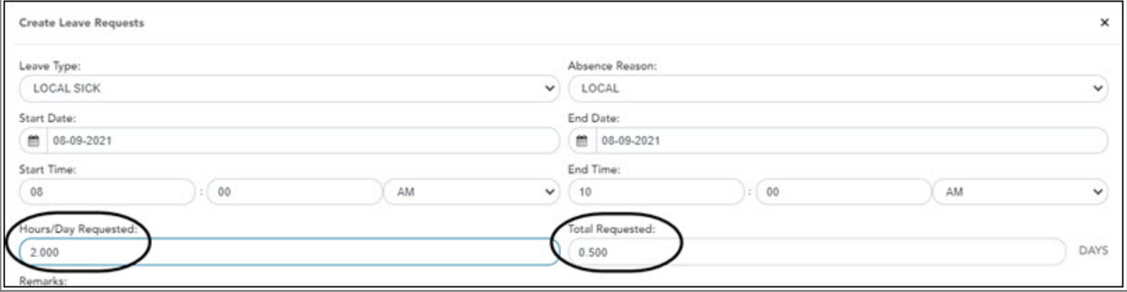
Type:

From: mm-dd-yyyy

Unprocessed Leave Requests

Start Date	End Date	Start Time	End Time	Leave Type	Absence Reason
No Results Found					

Use PMIS for Supervisor Levels	(Optional if using PMIS) Select to reference the Position Management Information System (PMIS) to determine an employee's supervisor. This option obtains the supervisor's employee number from the employee's primary position to determine the appropriate approval path for the employee's leave request. If this field is selected, you do not need to complete the Payroll > Tables > EmployeePortal Supervisors > Employee/Supervisor page.

Force Entry of Leave Hours Requested	Select to require the employee to enter the number of requested leave hours when submitting a leave request. If selected, the number of leave hours requested is not automatically calculated. **Create Leave Requests** × Leave Type: LOCAL SICK Absence Reason: LOCAL Start Date: 08-09-2021 End Date: 08-09-2021 Start Time: 08 : 00 AM End Time: 10 : 00 AM Hours/Day Requested: 0.000 Total Requested: 0.000 DAYS If not selected, the number of leave hours requested is automatically calculated based on the start and end time of the leave request. **Create Leave Requests** × Leave Type: LOCAL SICK Absence Reason: LOCAL Start Date: 08-09-2021 End Date: 08-09-2021 Start Time: 08 : 00 AM End Time: 10 : 00 AM Hours/Day Requested: 2.000 Total Requested: 0.500 DAYS Remarks:
Meal Break for Leave Calculation	Type the number of hours to be included in the hours per day calculation if a leave request exceeds five hours. An amount must be entered if a meal break is to be subtracted in the hours per day calculation. Valid values are 0.00-9.99.

❑ Click **Save**.

Review the Leave Requests Help page for further information about how the **Total Requested** column is calculated.

After the above steps are completed, employees can submit leave requests in EmployeePortal.

Ensure that all employees are set up with a user name and password, and can log on to EmployeePortal. If not, review the Employee Guide: Create Account & Login for additional information about user setup.

ASCENDER®
ELEVATING TECHNOLOGY SOLUTIONS
ASCENDER GUIDES
ASCENDER.
ELEVATING TECHNOLOGY SOLUTIONS

Back Cover